

UNITED STATES PATENT AND TRADEMARK OFFICE

BEFORE THE PATENT TRIAL AND APPEAL BOARD

PHILIP T. DAVIS, JANET M. McCUNE,
and HUBERT V. FORCIER
Junior Party
(Patent No. 7,113,913)

v.

MATTHEW B. SCHOEN and JEAN-PHILIPPE KHODARA
Senior Party
(Application No. 11/861,084)

Patent Interference No. 105,913 (JC)
(Technology Center 3600)

DECLARATION – Bd. R. 203(b)¹

¹ “Bd. R. x” may be used as shorthand for “37 C.F.R. § 41.x”. 69 Fed. Reg. 49960, 49961 (12 Aug. 2004).

1 **Part A. Declaration of Interference**

2 An interference is declared (35 U.S.C. § 135(a)) between the above-
3 identified parties. Details of the application, patent, count(s) and claims designated
4 as corresponding or as not corresponding to the count(s) appear in Parts E and F of
5 this DECLARATION.

6 **Part B. Judge managing the interference**

7 Administrative Patent Judge Josiah Cocks has been designated to manage
8 the interference. Bd. R. 104(a).

9 **Part C. Standing order**

10 A Trial Section STANDING ORDER [SO] (Paper 2) accompanies this
11 DECLARATION. The STANDING ORDER applies to this interference.

12 **Part D. Initial conference call**

13 A telephone conference call to discuss the interference is set for **1:30 p.m.**
14 **on 05 February 2013** (the Board will initiate the call).

15 No later than four business days prior to the conference call, each party shall
16 file and serve (SO ¶¶ 10.1 & 105) a list of motions (Bd. R. 120; Bd. R. 204; SO ¶¶
17 104.2.1, 120 & 204) the party intends to file.

18 A sample schedule for taking action during the motion phase appears as
19 Form 2 in the STANDING ORDER. Counsel are encouraged to discuss the
20 schedule prior to the conference call and to agree on dates for taking action. A
21 typical motion period lasts approximately eight (8) months. Counsel should be
22 prepared to justify any request for a shorter or longer period.

Part E. Identification and order of the parties

Junior Party

Named Inventors: Philip T. Davis, New Fairfield, CT
Janet M. McCune, Plymouth, MN
Hubert V. Forcier, Minneapolis, MN

Involved Patent: Patent 7,113,913, issued 26 September 2006, based
on application 09/328,856, filed 09 June 1999.

Title: Method and System for Providing Insurance
Protection Against Loss of Retirement
Accumulations in a Tax Favored Defined
Contribution Plan in the Event of a Participant's
Disability

Assignee: Corporate Compensation Plans, Inc. of
Connecticut

Senior Party

Named Inventors: Matthew B. Schoen, Ojai, CA
Jean-Philippe Khodara, Aix En Provence, France

Involved Application: Application 11/861,084, filed 25 September 2007.

Title: Computer Apparatus and Method for Illustrating,
Issuing, and Managing Disability Coverage for
Retirement Plans with Individual Accounts

Assignee: Matthew B. Schoen

The senior party is assigned exhibit numbers 1001-1999. The junior party is
assigned exhibit numbers 2001-2999. Bd. R. 154(c)(1); SO ¶ 154.2.1. The senior
party is responsible for initiating settlement discussions. SO ¶ 126.1.

1 **Part F. Count and claims of the parties**

2 Count 1

3 Claim 1 of Davis' Patent

4 or

5 Claim 1 of Schoen's Application

6
7 The claims of the parties are:

8 Davis: 1-34

9 Schoen: 1, 13-17, and 25

10 The claims of the parties which correspond to Count 1 are:

11 Davis: 1-34

12 Schoen: 1, 13-17, and 25

13 The claims of the parties which do not correspond to Count 1 are:

14 Davis: none

15 Schoen: none

16 The parties are accorded the following benefit for Count 1:

17 Davis: application 60/088,969, filed 10 June 1998.

18
19 Schoen: application 09/861,752, filed 21 May 2011.

20
21 application 08/936,037, filed 23 September 1997,
22 now patent 6,235,176.

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2 **Part G. Heading to be used on papers**

3 The following heading must be used on all papers filed in this interference,
4 see SO ¶ 106.1.1:

5
6 Filed on behalf of: *Party @*

Paper *Leave Blank*

7 By: *Counsel Name(s) @*

8 *Address @*

9 *(@@@) @@@- @@@@ (telephone)*

10 *(@@@) @@@- @@@@ (facsimile)*

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12 UNITED STATES PATENT AND TRADEMARK OFFICE

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16 BEFORE THE PATENT TRIAL AND APPEAL BOARD

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Enc:

cc (via overnight mail):

Representative for Schoen:

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